



**CMIPS II  
REQUEST FOR PROPOSAL  
HHSDC 4130-141A  
ADDENDUM 15**

**Section 1  
INTRODUCTION AND  
OVERVIEW OF REQUIREMENTS**

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## 1 PURPOSE OF THIS REQUEST FOR PROPOSAL

The State has developed this Request for Proposal (RFP) to solicit proposals for program support services for the California Department of Social Services (CDSS) for the Personal Care Services Program/In-Home Supportive Services (IHSS) Plus Waiver/IHSS Residual Program (PCSP/IPW/IHSS-R) and Waiver Personal Care Services (WPCS) and for the replacement of the existing Case Management, Information and Payrolling System (Legacy CMIPS System). The program support includes daily payroll processing, case management, and management reporting functions. The CMIPS System replacement services include design, development, implementation, maintenance and operation of a new system to be known as CMIPS II. The Legacy CMIPS System is a production system that has been in operation since 1980. The Legacy CMIPS System is operated through a service contract with the State maintaining an oversight role.

It is critical to the success of this project that there is no disruption in PCSP/IPW/IHSS–R services during the transition from the current system (Legacy CMIPS System) and contract to the new system (CMIPS II) and Contract, and in the implementation of future system enhancements.

The State intends to award three contracts to a single Contractor for CMIPS II; one contract for Design, Development, and Implementation (DDI) which will continue through complete system implementation and deployment, one contract for Maintenance and Operation (M&O) of the implemented and deployed system, and a third contract for Hardware and Software. The Contract Terms and Conditions contained in RFP Section 11A Contract will apply to all three Contracts however the contract for M&O and the contract for Hardware and Software will not require Contractor to provide the State with a performance bond. Bidders will prepare and submit to the State a single proposal based upon the single Statement of Work and Technical Requirements contained in this RFP. The single bidder proposal determined by the State to provide it the best value will be awarded, if Contract Awards are made, the three contracts which will be entered into by the State and Contractor simultaneously upon Contract award. The duration of the three Contracts will be for seven (7) years with the option of three (3) one (1) year extensions. All three Contracts will be awarded simultaneously to the winning Bidder.

The detailed requirements for CMIPS II are defined in Section 6, TECHNICAL REQUIREMENTS - Statement of Work (SOW), Section 6, TECHNICAL REQUIREMENTS - System Requirements Specification (SyRS), and Section 11, CONTRACT.

## 2 SCOPE AND VENDOR ADMONISHMENT

Included in this document are the instructions governing this RFP, the format in which Proposal information is to be submitted, and the material to be included therein. Also included are all requirements that must be met to be eligible for consideration and Bidders' responsibilities before and after Contracts Award.

### 2.1 Business/Technical Requirements Procurement

Bidder must propose a **total business solution** that integrates technology, Contractor services, and State resources to achieve the best value to the State.

The requirements presented in this RFP are based on business needs and are not geared toward a specific technical solution. Bidder may propose any technical solution that meets the State's defined requirements as specified in this RFP.

Responses to this RFP will be evaluated in accordance with the evaluation methodology identified in Section 10, EVALUATION OF PROPOSALS. This methodology has been structured first, to conduct a Submission Review to ensure all required components of the Proposal have been properly submitted; second, to conduct a Compliance Review to determine if the mandatory requirements were met on a Pass/Fail basis; third, to conduct the Scoring Review to score elements of the proposal; and finally, to evaluate and score the Cost Proposal. Sixty percent (60 %) of the scoring will be based on the business and technical requirements, and forty percent (40 %) of the scoring will be based on cost.

## **2.2 Procurement Process**

This procurement process will include the steps outlined in Paragraph 5, Key Action Dates and Section 2, RULES GOVERNING COMPETITION. These steps will serve to increase the likelihood that Final Proposals will be received without disqualifying defects. These steps are intended to do the following:

- Ensure that each Bidder clearly understands the State's requirements before attempting to develop its final proposal.
- Ensure that the State clearly understands what each Bidder intends to propose before the proposals are finalized.
- Give the State and each Bidder the opportunity to discuss weaknesses or potentially unacceptable elements of the RFP and the Bidder's Proposal, including the RFP requirements. This will also give the State the opportunity to modify the requirements and the Bidder the opportunity to modify its Proposal to correct any identified problems.

Bidder participation in each step is extremely important.

## **2.3 Important Bidder Information**

To be afforded the benefits of the steps included in this RFP, the Bidder must take the responsibility to do the following:

1. Submit all responses, complete in every detail, by the dates and times specified in Paragraph 5, Key Action Dates;
2. Make sure that all procedures of the RFP are accurately followed and requirements are appropriately and completely addressed; and
3. Ask questions in a timely manner if clarification is necessary.

## **3 PROCUREMENT OFFICIAL**

The State of California Procurement Official for all contacts between the State and the Bidder is:

Tom Burton, Senior Procurement Specialist  
Department of General Services  
Procurement Division  
707 Third Street, 2<sup>nd</sup> Floor  
West Sacramento, CA 95605

**RFP – HHSDC-4130-141A**  
**Case Management, Information and Payrolling System (CMIPS II)**  
**Section 1 – Introduction and Overview of Requirements**

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Phone: (916) 375-4493  
Fax: (916) 375-4490  
Email: tom.burton@dgs.ca.gov

## **4 PROJECT RESPONSIBILITY**

The CMIPS Project is a partnership of Federal, State, and county organizations, based on recognition that it is in all parties' best interests to improve the efficiency and effectiveness of the PCSP/IPW/IHSS-R Programs. For purposes of this RFP, a project is defined as the planned undertaking regarding the entire subject matter and the terms of the Contracts, and the activities of all parties related hereto for the CMIPS II System.

The CDSS Adult Programs Branch (APB) is the Program Sponsor and is responsible for the success of the PCSP/IPW/IHSS-R program. The CDSS defines policy and regulations for the PCSP/IPW/IHSS-R programs. The CDSS provides funding and general oversight for the CMIPS Project. The CDSS APB has contracted with the Office of Systems Integration (OSI) for a CMIPS Project Office, which is responsible for the day-to-day management of the CMIPS II procurement effort and subsequent Contract oversight. The Department of General Services (DGS) is responsible for conducting the CMIPS II procurement.

A more detailed description of these entities along with the CMIPS II consumers, users, control agencies, advisory groups, and interface agencies is available in Section 6, TECHNICAL REQUIREMENTS – Statement of Work (SOW).

## **5 KEY ACTION DATES**

Listed below are key actions, including dates and times by which those actions must be taken or completed. If the State finds it necessary to change any of the dates prior to the submission of the Final Proposal, it will be accomplished via an addendum to this RFP. ALL DATES AFTER THE FINAL PROPOSAL SUBMISSION DEADLINE ARE APPROXIMATE AND MAY BE ADJUSTED AS CONDITIONS INDICATE, WITHOUT ADDENDUM TO THIS RFP.

**Table 1. Key Action Dates**

<b>STEP</b>	<b>[RESPONSIBLE FOR] ACTION</b>	<b>START DATE</b>	<b>FINISH DATE</b>
1	(State) RFP Release	---	4/8/2005
2	(Bidders) Last day to submit questions for Bidders Conference		4/26/05
3	(State and Bidders) Bidders Conference (1:00 – 3:00 pm at the Department of Technology Services (DTS) Training Center, 9323 Tech Center Dr., Suite 100, Sacramento, CA 95826, Room 2)		5/3/05
4	(Bidders) Submit Letter of Intent to Bid	---	5/20/2005
5	(Bidders) Last day to submit questions for clarification of RFP prior to submittal of Draft Proposals (by 2:00 pm)	---	6/6/2005
6	(Bidders) Submission of Draft Proposals (by 2:00 pm)	--	7/8/2005
7	(State) Evaluate Draft Proposals	7/8/2005	8/30/2005
8	(State and Bidders) Confidential Discussions *	8/31/2005	9/20/2005
9	(Bidders) Last day to submit questions concerning RFP requirement changes	---	6/7/2006
10	(Bidders) Last day to request a change in the requirements of the RFP **	---	6/7/2006
11	(Bidders) Last day to protest the requirements of the RFP	---	8/9/2006
12	(Bidders) Last day of discussions with State Data Center (by 3:00 pm)	---	6/27/2006
13	(Bidders) Last day to submit questions prior to submission of Final Proposals	---	6/19/2006

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**Case Management, Information and Payrolling System (CMIPS II)**  
**Section 1 – Introduction and Overview of Requirements**

STEP	[RESPONSIBLE FOR] ACTION	START DATE	FINISH DATE
	(by 2:00 pm)		
14	(Bidders) Submission of Final Proposal (by 2:00 pm)	---	8/28/2006
15	(State) Final Proposal Evaluation (Admin and Technical Only) ***	8/28/2006	11/6/2006
16	(State) Notification of public Cost Proposal Opening ***	---	11/6/2006
17	(State/Bidders) Preparation for Cost Opening ***	11/6/2006	11/7/2006
18	(State and Bidders) Cost Proposal Opening ***	---	11/8/2006
19	(State) Evaluate Cost Proposals ***	11/9/2006	11/28/2006
20	(State) Prepare Evaluation and Selection Report ***	11/29/2006	12/12/2006
21	(State) Selection Report Review and Approval by CDSS, OSI, and DGS ***	12/12/2006	12/18/2006
22	(State) Notification of Intent to Award ***	---	12/19/2006
23	(State) Prepares IAPD/SPR for apparent Selected Bidder's Proposal ***	12/19/2006	12/28/2006
24	(State) IAPD and Contracts Approval ***	12/28/2006	5/21/07

- \* The State **will give ALL Bidders feedback regarding their** Draft Proposals. **ALL** Bidders submitting Draft Proposals will be contacted to schedule a Confidential Discussion.
- \*\* Or five (5) business days following the last Addendum that changes the requirements of the RFP. See Section 2, RULES GOVERNING COMPETITION, Paragraph 2.6, Addenda.
- \*\*\* Everything after the due date of the Final Proposal is tentative and may be changed by the State without issuing an addendum to the RFP. The Bidder will be notified at least three days prior to the Key Personnel Interviews and the Cost Proposal opening so that they may arrange for their attendance.

## **6 BIDDER'S LIBRARY**

The State will maintain a Bidder's Library with the items listed in Appendix B, List of Bidder Reference Materials and Internet Links. Bidders will be able to download copies of electronic documents through the project website, [www.cmipsproject.ca.gov](http://www.cmipsproject.ca.gov).

The State will also maintain a physical Bidder's Library at 8745 Folsom Blvd., Suite 230, Sacramento, California for materials that are only available in hard copy. Bidders may visit the library to review the contents. For information that is available in hard copy only, the State will make hard copies of requested documents for twenty-five cents (\$0.25) a page plus postage. Large documents (more than 100 pages) will require up to five (5) business days to copy.

The exception to this process is material in the Bidder's Library that is copyright protected. The State will not provide copies of any material that is copyright protected.

To schedule an appointment, Bidders should contact the Procurement Official listed in Paragraph 3, Procurement Official.

## **EXHIBIT 1-1 ADA COMPLIANCE POLICY**

### **ADA Notice**

Procurement Division (State Department of General Services)  
AMERICANS WITH DISABILITIES ACT (ADA) COMPLIANCE  
**POLICY OF NONDISCRIMINATION ON THE BASIS OF DISABILITY**

To meet and carry out compliance with the nondiscrimination requirements of the Americans With Disabilities Act (ADA), it is the policy of the Procurement Division (within the State Department of General Services) to make every effort to ensure that its programs, activities, and services are available to all persons, including persons with disabilities.

For persons with a disability needing a reasonable accommodation to participate in the Procurement process, or for persons having questions regarding reasonable accommodations for the Procurement process, please contact the Procurement Division at (916) 375-4400, the Procurement Division TTY/TDD (telephone device for the deaf) or California Relay Service numbers which are listed below. You may also directly contact the Procurement Division contact person that is handling this procurement.

**IMPORTANT: To ensure that we can meet your need, it is best that we receive your requests at least 10 WORKING DAYS before the scheduled event (i.e., meeting, conference, workshop, etc.) or deadline due-date for Procurement documents.**

The Procurement Division TTY telephone numbers are:

Sacramento Office: (916) 376-1891  
Fullerton Office: (714) 773-2093

The California Relay Service Telephone Numbers are:

Voice: 1-800-735-2922 or 1-888-877-5379  
TTY: 1-800-735-2929 or 1-888-877-5378  
Speech to Speech: 1-800-854-7784